

How We Helped Alex & Julia

1. CLIENT OVERVIEW

Alex (55) and Julia (60) have been together for over 20 years. While they aren't legally married, they've built a life together and want to make sure each of them is protected if something happens. Without legal planning documents, they weren't sure what would happen if one of them got sick or passed away.

2. CHALLENGES FACED

- No legal authority for medical or financial decision-making.
- Oklahoma's default inheritance laws would not pass assets to an unmarried partner.
- Property ownership was not structured to guarantee survivorship rights.
- Risk of family interference or legal disputes in a crisis.

3. PLANNING STEPS TAKEN

- Completed an Oklahoma Healthcare Power of Attorney and HIPAA form.
- Executed a Financial Power of Attorney to allow bill payments and account access if needed.
- Created wills naming each other as primary beneficiaries, with trusted friends receiving sentimental items.
- Updated property deed to include right of survivorship.
- Created and carried Emergency Medical Access Cards to ensure hospital staff could recognize decision-making authority.



4. RESULTS ACHIEVED

- Peace of mind knowing their wishes are legally protected.
- Reduced risk of costly disputes or delays in emergencies.
- Guaranteed housing security for the surviving partner.
- Simplified financial and healthcare decision-making in a crisis.
- Strengthened their sense of control over their shared future.

5. REFLECTION

"We feel more secure knowing that no matter what happens, we'll be able to protect each other."

— Alex & Julia (names changed)

6. WHAT THIS MEANS

At Yew Tree, we don't just focus on paperwork — we focus on people. For Alex and Julia, that meant building legal protections that honored their relationship and safeguarded the life they've built together.

Their story is a reminder that you don't have to be married to create a plan that protects the person you love most.



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